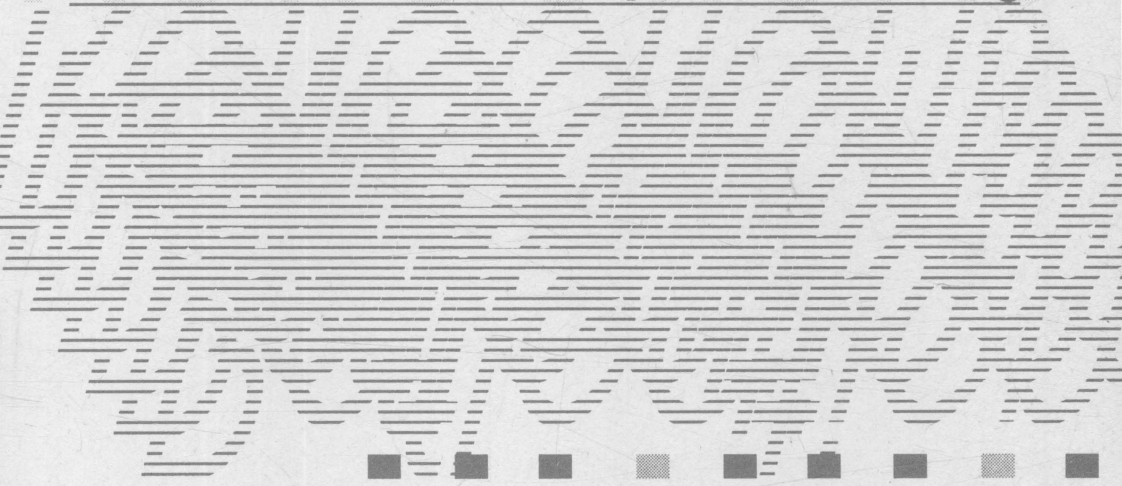
Extension Bulletin 839

Reflections

on Community Planning



A Guide for the First-Time Planner

THE OHIO STATE UNIVERSITY EXTENSION

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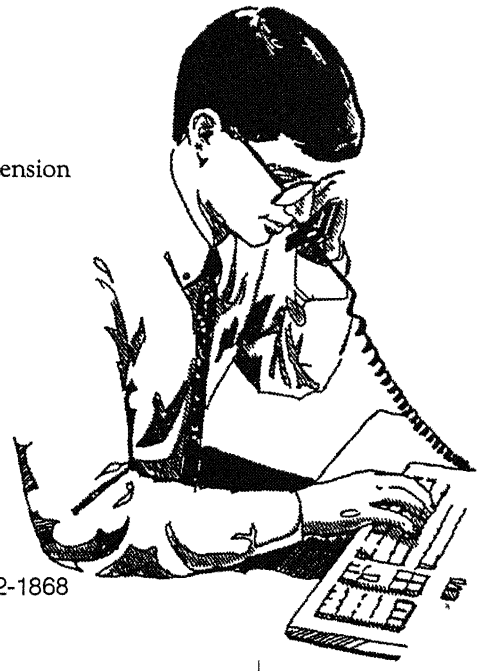

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Reflections on Community Planning A Guide for the First-Time Planner

Foreword

During the past 25 years, I have participated in a variety of planning efforts. Many were conducted by organizations that desired to set future goals and direction. Others were aimed at solving a specific issue within a group. I have enjoyed and valued many of these planning opportunities. I have been frustrated, quit and given up hope during other efforts—fortunately, not very many.

The successful planning processes had two aspects in common: solid leadership and careful preparation. Frequently, organizations had staff who were trained to lead the effort or had the financial resources to hire a professional. Occasionally, the leader of the group, whether its director, president or chairperson, could provide the skills necessary for success. Few community organizations have the luxury of having a planner on staff or the dollars to pay for a well-trained and experienced professional. Therefore, we depend on existing leaders or a volunteer who is willing to undertake the task.

To look up and not down
To look forward and not back,
To look out and not in, and
To lend a hand.
—Edward Hale

In titling this publication, I use the phrase "community" planning. A community can be any group that shares a common bond. Examples include clubs, non-profit organizations, towns, churches, schools, businesses and agencies. Often these groups need a plan that addresses some aspect of their mission, but they may not have a trained planner to help them.

For complicated and highly detailed plans such as strategic plans that examine the basic mission and values of an organization or business plans that require a financial format, I would recommend consulting resources that provide more specific information. Some suggestions are in the reference list below. These resources

can be found at local or college libraries. Other suggestions are at the end of this bulletin.

Below, Patrick J., George L. Morrisey, and Betty L. Acomb. *The Executive Guide to Strategic Planning.* San Francisco: Jossey-Bass Publishers, 1988.

Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement.* San Francisco: Jossey-Bass Publishers, 1988.

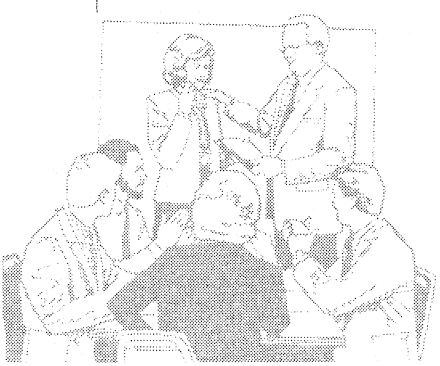
Cope, Robert G. *Opportunity from Strength: Strategic Planning Clarified with Case Examples.* ASHE-ERIC Higher Education Report No. 8. Washington, DC: Association for the Study of Higher Education, 1987.

The purpose of this bulletin is to provide basic planning principles for less experienced individuals who want to lead or participate in a planning effort. This is not a "step-by-step" booklet, as I have found each planning process unique. Rather, I have tried to raise issues you will face. I suggest approaches to deal with these questions and alert the reader to key elements that can help you achieve your goal with the support of all involved.

This bulletin is primarily for planning that involves a significant number of people. Later, we discuss the value of involving as much of the community as possible to strengthen the plan. If you can shut your office door, assemble the plan and are solely responsible for it, much of the information in this bulletin will not apply.

In various planning projects, I have had sole responsibility, served as co-chair, and been a member for large and small efforts. In each effort, I have made mistakes. Take the information provided as advice from an experienced planner who has committed and learned from every error discussed.

If you haven't had much experience, remember to stay open to advice. Do your homework but relax and enjoy the process and give credit to yourself for your contribution.



What is Planning?

There are as many definitions of planning as there are planners. For my purpose, I define planning as:

"The systematic assembly of facts, hopes, dreams, or opinions to chart a course toward a desired outcome."

The typical plan will encompass the following elements:

- statement of the situation or problem(s)
- the goals to achieve
- resources to be used
- action steps to be taken
- the date for accomplishment
- an evaluation.

A plan is not action. The plan should include the proposed action(s) and the steps that will be necessary to achieve the desired goal. A good plan is like a newspaper article: It has the who, what, when, where and how.

By itself, a plan is only a sign of good intention. Without follow through, it is only an idea on a shelf.

I selected the word "systematic" to convey that good planning has to be planned! The way you organize and the steps you take to develop a plan are as important as the product. Planning that is unorganized and happens by chance will not accomplish the goals you desire. Participants will be frustrated and you will not be seen as a credible leader.

We never know how high we are til we are called to rise and then, if we are true to plan, our statures touch the skies.
—Emily Dickinson

Who Wants the Plan?

I once worked with a church school on a long-range plan. Who was the community that wanted the plan—the school and its clients or the church congregation that supported the school? A city tree commission wanted a plan. Who was the plan for: the city or the commission?

If you are selected or volunteer to be involved, it will be essential that you know clearly the community that you are planning for. You should be absolutely clear about the sponsor before you begin. Some serious flaws in your process can develop quickly if you are not.

Remember, the sponsor must turn your plan into reality. If ownership is not clear and no one with authority to act is eagerly awaiting the results, you will waste time and energy.

The leaders of the sponsoring community must be committed. They provide the needed resources, data, opinions, authority and legitimacy. While the leaders do not need active involvement in the process, they must desire the results.

Ideally, it is the organization's leader(s) who announces the planning and its purpose (to all involved in the community). This legitimizes those working on the plan and creates awareness and potential input from the community. Later, I describe the value of this concept.

The Planning Goal

Every planning effort must have a clearly stated purpose.

The leader or leadership group must put this purpose in writing. Those who become involved will know why their group exists, and what they are aiming for as a result. Stating the reason for the plan in a way that all can understand and accept helps to create a foundation that everyone can stand on together. Nothing is more frustrating than a group working at cross purposes because of a fuzzy understanding about its goal.

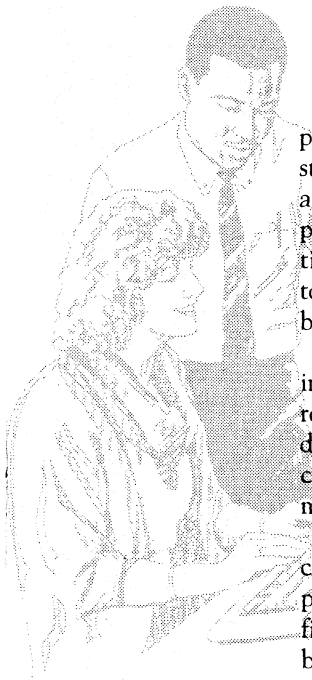
The goal can come from one individual or from a group in the community. Members of the community should perceive the goal as important and needed. If not, there will be little enthusiasm for and commitment to any changes suggested in the plan.

Is the goal so far away? Far, how far no tongue can say, Let us dream our dream to-day.
—Alfred Tennyson

Simple words often have different interpretations. Those who lead the planning activity must have a common understanding of the goal. They should convey it clearly to others involved and repeat it regularly to be sure everyone is working toward the same purpose.

Members of the committee must express a commitment. They should commit the time necessary, actively participate in the discussion and decision making, assume an equal share of the committee assignments, and respect the opinions of other members. It's helpful at the outset to state precisely how much time the project is likely to take. Members then can make an informed commitment.

The individual(s) responsible for developing the goal statement should also include a date for completing the planning



process. With an ending date in mind, planners can set up realistic steps, explain time commitments and assign resources. This will allow you to set other deadlines that may have a bearing on your project. Some argue that the steps should come before the completion date is set. I believe it is better to set a due date and work toward it. If you find that the original date was not realistic, it can be changed if your committee is supportive.

For example, if the goal of the plan is to increase membership in your club, you will want the plan completed, accepted and ready to carry out before the annual membership drive. If a department is requested to prepare a plan for a 20 percent budget cut that will occur in two weeks, those involved know that they must commit time immediately.

The individual who leads the planning effort should seek clarity about the expected results. Do those who want the plan prefer it be a recommendation only? Are they actually seeking the final decision about what should occur? Be clear about this point before you begin.

Who Plans?

"Who plans?" is really two questions: What are the various roles the participants play and who and how many participants to involve?

When considering a planning process that involves a significant number of people, address the question of how to identify the individuals to be involved. Before recruiting, identify the project leader(s) so he or she can be involved in this decision.

The project leader may be the person who developed the goal. Or he or she can be someone selected by the goal-setter(s) to lead the planning effort. Ultimately, the leader of the community must decide who will chair the committee. Someone has to get the ball rolling.

In a small community like a club, the president may ask one or two individuals to lead and complete the plan. Thus, no other roles may be necessary. Where the effort and the community are larger, the planning group may need additional members and staff.

A community is like a ship; everyone ought to be prepared to take the helm.
—Ibsen

Members can serve in primary or secondary roles. Primary members are those called the core group, the team, the commit-

tee, the task force or the commission. Secondary members are those not involved regularly but whose advice you might need occasionally. These members may be involved in an "ex-officio" role. The church accountant and minister can serve in an "on-call" status when their special expertise is needed. Other capacities can include reactors, public hearing participants, expert witnesses, etc.

The term staff does not always imply paid participants. Staff roles include facilitating, secretarial support, and the chairperson's responsibilities. You can recruit facilitators from many public agencies. Some, such as county Extension agents, may offer their services free as part of their agency's public responsibilities. Teachers, counselors, and human service personnel may be willing to contribute their skills as a volunteer in this role.

Secretarial support will be essential if your process is long and involved. A committee member may agree to perform this role. The organization can assign an elected or paid secretary for these tasks.

The chairperson of a small planning effort may find that most of the responsibilities will fall on him or her. Basic skills of the chair should include:

- the ability to communicate orally and in writing
- the ability to run a successful meeting
- the willingness to be flexible and open to other opinions
- the ability to listen well
- the ability to use a variety of methods to involve people

An appendix at the end of this bulletin lists some resources that will help you to succeed with the above skills.

The chairperson can assure successful meetings by taking certain steps. Prepare an agenda and provide it to members before the meeting. Locate a comfortable and conducive place to meet. Schedule meetings as far ahead as possible to assure maximum participation and provide the information and data that the group will need for decisions.

Minutes or notes should be kept and provided to members before the next meeting. This will be helpful especially for those who may miss a meeting and will serve to remind other members of decisions that were made. While the chairperson may not take the minutes, he or she has the responsibility for sending them and an agenda before the next meeting.

Next, consider the proper number for the committee and how to identify those who will serve.

My experiences have included planning committees as large as thirty and as small as two. The scope of your goal will help to dictate the correct number. A small project for a small community suggests a small group. A complex and detailed plan indicates that, in order to represent all viewpoints and to provide adequate members to share the work, a larger committee will be necessary.

Most experts feel that 9 to 12 people is the most desirable size for a group to function effectively. If you envision that the committee will vote as a way to determine questions, an odd number would be helpful.

Selecting the Planning Team

Organizing the membership is a delicate task depending on the sensitivity of the issues involved. A straightforward plan that will not address emotional or controversial issues requires less caution about who serves and who does not.

There are four recruitment processes that I have found to be the most frequently used:

Appointment—The leader of the community or the planning chairperson selects and appoints those individuals they believe will do the job. When selecting, consider the credibility of these members with the rest of the community.

Election—The chairperson asks sub-groups in the community to name a representative who will serve on their behalf. The sub-groups may choose to elect their representative. It is possible to have the total community elect the people they wish to serve. Be careful that those nominated and elected are truly committed to the project.

The pessimist complains about the wind; the optimist expects i to change; the realist adjusts th sails.

—Anonymous

Identification—The chairperson asks influential leaders in the community to provide the names of those they believe should serve. They can include their own name if they desire. Invite those whose names appear often on these lists. If there are certain types of people you desire, for example: teachers, you should give specific directions to those who are giving you names.

Blend—The community identifies some members by a

selection process. Appoint others who you desire and let community influentials identify the remainder.

There are variations on these methods and you may have other ideas about recruiting your team. The nature of your planning effort and the community involved will suggest how important the following issues are:

a) balancing male/female participation
b) involving minorities and various age groups
c) having representation from influential sub-groups
d) including strong-minded or controversial individuals
e) having people from all "walks of life"
f) involving representatives from outside your community

As project leader, be alert to other concerns in your organization that will have a bearing on the membership of the planning team.

The number of special concerns described above will be a significant deciding factor on your final number of committee members. Remember that it is possible to use secondary membership as a method to have additional viewpoints represented at committee sessions.

If your planning goal is perceived important or critical, people are more likely to serve. It's always a good idea to have more names than you need because a few people will probably be unable to serve.

I recommend personal as well as written contact to invite participation. The personal contact will allow you to answer questions more fully and to find out if potential members have special problems. The written invitation is an opportunity to confirm details and to re-state the goal of this effort.

The beginning is the most important part of the work.
—Plato

Planning the Planning

Yes, planning doesn't just happen. Give thought to how you intend to get the job done. Earlier, I discussed the need for clarity about the job (goal). Also, you need to know when a task should be done, and the type of individuals you want to complete a high-quality plan.

Planners have a saying, "First you must go slow so you can go fast." The beginning of the process and the key decisions made early on will lay a base for progress at a later time. Do not be surprised if your first meeting does not accomplish all that you hope.

Individuals that organize for the first time go through stages of growth as a working group. One model suggests that certain behaviors occur when the group first forms. Frequently, there is testing within the group to see if opinions and ideas will be accepted. There may be suspicion and anxiety exhibited by some members. Members may need time to share why they are involved. They should have a chance to share what they think should happen. If the initial meetings produce only minimal work, it should not be a surprise.

As the group grows clearer about its task, an understanding of the role of each member in the group will emerge. Confidence in each's abilities and trust that each members' opinions will be respected will begin to develop. The committee will pick up speed in accomplishing its task.

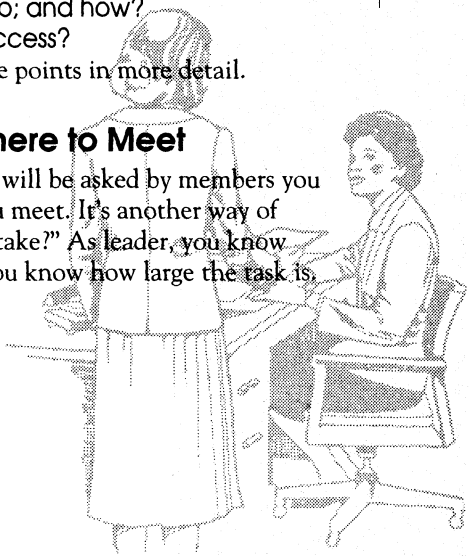
In the next section, I want to explore some of the questions you will need to answer during the early stages of the process. Consider the following:

- When, how frequently and where will you meet?
- How will your group decide issues?
- Will your process be confidential or open?
- How will you guarantee respect for all opinions?
- Will you need minutes; who will be responsible for them?
- How will you deal with members who miss meetings?
- How and when will you communicate to the others in the community affected by your planning?
- Do others outside the organization need to know the results of the plan?
- What data or information will you need to accomplish your goal?
- Will you need financial resources and a budget for your work?
- What are the major steps in your process and when should they be completed to meet your deadline?
- Who will present the plan to; and how?
- How will you determine success?

Let's think about each of these points in more detail.

When and Where to Meet

One of the first questions you will be asked by members you are recruiting is how often will you meet. It's another way of saying, "How much time will this take?" As leader, you know when you are to begin and end. You know how large the task is.



In your own mind try to picture how much effort is required and what you consider the major activities to be during the process.

Some groups can meet during the day if the purpose of your planning process is consistent with their professional responsibilities. Some organizations will grant release time. Planning groups related to personal, social or recreational issues will probably need to meet in the evening.

Frequency of meetings will depend again on the scope of the task and the time allotted to complete it. Committee members may expect an estimate from you. It is wise to postpone a final decision about when and where to meet until the committee begins to function. Many members (and you) may not be able to answer the question until a full understanding of the project occurs. Especially at the beginning, frequent meetings can build momentum quickly as members become familiar with each other and develop shared skills.

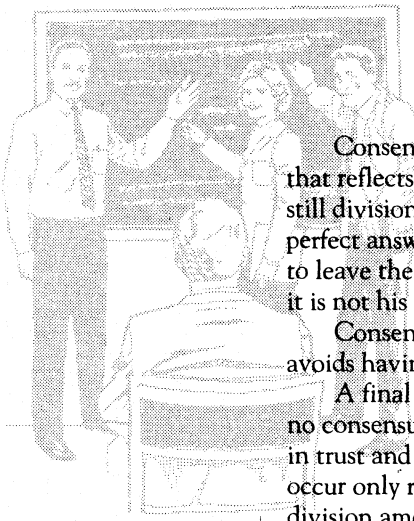
The location of your meeting should provide adequate space and lighting for a comfortable work environment. If the group covers a large geographic area, travel distance should be a factor. When possible, a site should have access to equipment that you might need. And of course, the budget will dictate whether or not you can rent a hotel meeting room or similar facility.

Consider access to easy parking for disabled individuals and security, especially at night. I once met with a group in a very convenient location. Unfortunately the door to the building locked automatically and it was impossible to hear anyone who came late and needed access. As you can imagine, attendance suffered and the latecomers got pretty angry. Remember, little details often prove the most important.

Decision Making

For our purposes, I consider decisions to be either autocratic or democratic. Autocratic decisions don't have much place in a planning process. Remember, the hope is to build ownership and involvement. You want a quality plan acceptable to the majority. Decisions made by one individual without the input of others will frustrate these results.

Democratic decisions that involve the whole group are accomplished by voting or consensus. Usually, the majority decides. If your group votes, it will be important to consider how to deal with the feelings and thoughts of those in the minority. Voting allows a clear and quick decision but can lead to division if not handled properly.



Consensus can be a better method. Seek to find a decision that reflects the opinion of the total membership. When there is still division, work to find alternatives. If you cannot find the perfect answer, one that everyone in the group can live with, try to leave the meeting with a decision everyone can support even if it is not his or her preference.

Consensus building takes more time but unites the team and avoids having a committee with winners and losers.

A final option is to agree, that if after a certain period, there is no consensus, a vote will be taken. I hope that as your group grows in trust and confidence and struggles to find consensus, this would occur only rarely. Consensus builds ownership and eliminates division among participants.

In a few short paragraphs, I hardly give justice to as complicated a topic as decision making. As with other points discussed in the bulletin, I encourage the reader to seek additional material from a public library. Literature on decision making, negotiating, conflict management, and communication will provide additional background. I have provided some suggested readings at the end of this bulletin.

Confidential or Open

Plans that give a competitive edge to a business or that affect national security or other issues of such importance require confidentiality. Most community planning efforts will not fall into this group.

When we discuss the section on "Communication," I'll describe how to involve others in the process. It is important in community planning to have a process that is open to all members of the affected group.

An operating rule for your committee should include candid and honest interchange among members. The committee should trust that comments will not go out to the wider community. When discussing individuals, this is especially important. Committee members should be free to agree what goes into the minutes and what should not. Each member should pledge his or her willingness to maintain confidentiality about certain matters if requested.

An open process will create more positive feelings among those affected by the plan. As I discuss in "Communication," you may want to design formal opportunities for involvement.

Respecting Opinions

From the first meeting the chairperson should set a tone that conveys respect for the opinions and ideas of each member.

Whenever possible, use techniques such as brainstorming and small-group activities to encourage input from each member. Using a flip chart or blackboard to record ideas allows each person to feel that his or her comments are important.

Do but set the example Yourself. . . Example is The best precept.
—AESOP

The chair should be sure that all members are participating. This may mean occasionally calling on individuals who are quiet to assure their opinion is sought. Gently, the chair must interrupt those who talk too much or who try to dominate the meeting. A comment such as, "Let's hear from some others," can help in these situations.

If you have someone who is negative and sets an unproductive tone at the meeting, meet with the individual alone. Share how you feel his or her behavior is affecting the group. Every group goes through a "chaotic" stage, with conflict and divergent thinking; and this is necessary and inevitable. It also won't last forever.

At the first meeting, it would be useful to state clearly that this is how you want the group to function. Invite the members to share their feelings about ways the group can help create an atmosphere of respect and trust. Sometimes people assume this will happen, but unless you consciously raise the issue, it might not.

Minutes

If you plan to meet more than once or twice, minutes are a useful tool. Minutes need to capture the essence of the meeting and not every detail. Always include all decisions.

Minutes serve to keep others involved who are not directly a part of the process. A town commission can use them to keep the mayor and council members informed even if they are not officially part of the process.

Obviously, minutes will serve to keep absent members informed and save time at committee meetings reviewing past progress.

Earlier, I discussed the need to have someone who is not a part of the committee take the minutes. This allows the members

to concentrate fully on the task. Resources will dictate whether or not you can do this. In any case, it's helpful to have someone other than the chairperson keep the minutes.

Before the next meeting, send out the minutes and include an agenda for the following meeting. The agenda should include a reminder of the time and location.

Missing Members

If you have clarified the responsibilities and time commitment, you have members who know what to expect when they agree to serve. Setting dates in advance for future sessions helps to assure that all members can attend.

The agenda can remind members of the next meeting. If the group is small, a personal phone call can serve as an extra reminder.

Be sure to identify a person to contact so those who are not attending know who to call. This will save delaying the meeting waiting for an individual who is not coming.

Some groups use a buddy system so members who miss a meeting have someone assigned to contact them. This person can bring them up-to-date and encourage their attendance.

Eventually, the committee (or you as chair) may need to decide about the person who continually misses meetings. I suggest the direct approach of calling the individual. Ask if they wish to be removed from the membership. This will be especially important if the individual is serving on the committee as a representative of a sub-group within the community. You will need to decide whether to replace the person or whether it is too late in the process. If this group does not have a representative, there will be an added burden keeping communication open between the sub-group and the planners.

Communications

At the risk of over-simplifying, let's consider two models of planning. I'll call these the "Bomb Model" and "Accordion Model."

The bomb approach is characterized by a group that meets pretty much by itself and shares little of what it is doing or thinking. Then, it drops the plan on an unprepared community. If luck is on their side, the group receives the plan favorably and congratulates them. More likely, the plan causes an explosion of emotion, both positive and negative.

Some people may feel that the plan causes them to lose something of value. The plan may not address what they feel would be a better solution. These individuals and others may feel that if their opinions and advice had been sought, considered (and possibly included) the result would have been better.

The accordion model demonstrates the principle of constant opening and closing to produce results. In this type of planning process, the committee goes back and forth to the public to keep them aware of what is occurring. The committee seeks ideas and reactions to the plan as it is developing. There is openness to the community and its ideas. There is a closed time when the committee considers the community's thoughts, does its work and prepares its next steps.

The accordion model of planning is the preferred method in most cases because it builds support and enthusiasm for the plan before announcing it. Also, it lets you test ideas and recommendations for reaction before they are finalized. Change occurs easier when ideas are not "set in concrete." If the team invites reactions and seriously considers them, the audience that receives the plan will sense that it reflects their values.

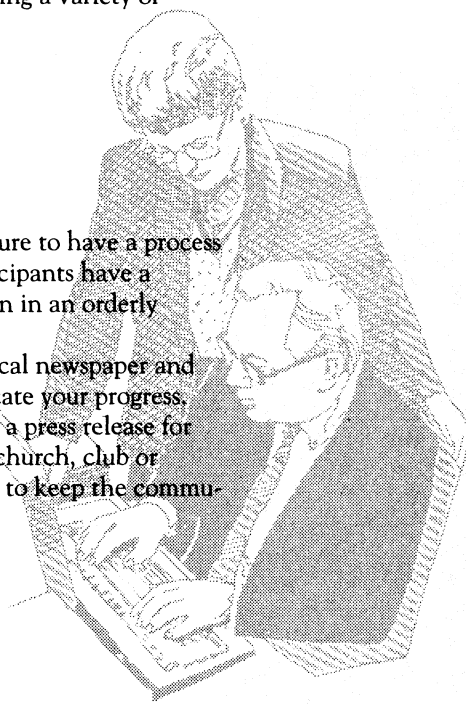
The conclusions of some plans, especially if they relate to public policies or political decisions, can be controversial. By trying to understand what people want and their concerns, you can address these problems before completing the plan.

You can gain input for your committee using a variety of techniques, such as:

- surveys
- interviews
- expert witnesses
- opinion polls
- public hearings
- open meetings

If you use open meetings or hearings, be sure to have a process in mind and ground rules to follow so all participants have a chance to speak. Be sure to conduct the session in an orderly fashion with respect for everyone's ideas.

If the plan will affect many people, the local newspaper and other media may be willing to help communicate your progress. You or another member might write a story or a press release for the paper, radio and TV. Perhaps the school, church, club or organization has a newsletter that you can use to keep the community informed.



Smaller communities with a more limited planning goal will have difficulty finding other methods to share information. If the total group is small enough, a letter to each person explaining what is happening may be a useful method.

Information Needs

Many planning efforts will require information or data to help reach conclusions.

If your goal is to "develop a plan to increase membership by 20 percent by January 1," what information do you need?

First, you may need to know why people join the club. What benefits do the current members believe they receive by being a part of the club community? Determine this by conducting an interview or survey of members. Colleges, county Extension offices and school systems often have staff who can aid in developing questionnaires. These individuals can help you design a survey or interview tool that is clear and objective.

Consider another survey for non-members to determine their reasons for not becoming members.

You may want to learn the make-up of your current members—age, sex, income, occupation, etc. This information is called "demographics."

When you know who joins the club and why, you can then develop a plan to market the benefits of the organization. You will know also who the most likely new members might be and their characteristics. Finally, consider how to get your message to these individuals. How were your current members recruited? How did they hear about the club?

The example above contains two types of information: a) attitudes and b) facts. Attitude refers to feelings both positive and negative about the organization. Facts are the demographics of the current members. The methods used to recruit current members are facts also.

When the committee combines this information, it can develop a plan to promote the benefits of belonging, and overcome some negative feelings non-members may have. The committee will know how and where to get the recruitment message out to the public. And, they should know who will be influenced favorably by their message.

Some information needed may be public or private statistics and facts. A local library or public officials can help locate the

source of this information. Unfortunately for some planning efforts, the information may not be in the form you need. For example, the committee may be doing a town study but the data needed only exists for the county. The group will need to decide how important this piece of information is to complete their goal. If it is essential, much extra work may be necessary to convert national, state or county information into a usable form for your community or group. Prepare for this stage of planning to be very difficult and time consuming. This of course will depend on the amount and type of data the committee needs to do an effective job.

Also, remember that surveys and interviews will take time and often gather information that is not factual but rather an individual's perception or opinion. Even so, this type of information is valuable for developing a good plan that addresses both real and perceived questions.

This part of the planning process shows the "accordion" principle of planning. The group must go out into the community to get objective and subjective information to strengthen the plan and to keep others involved and aware.

One more hint—the old saying, "numbers don't lie, but liars use numbers" may be a little strong. But, it does highlight one potential problem. If a number increases from 245 to 285, is it good or bad? If you want more, it's good, but if you want less, it isn't. How the planning team interprets statistics and other facts can lead to very different conclusions. Therefore, it is important that you and the committee members agree on a common understanding of the data.

A Planning Budget

Unless the community for which you are planning is small, there is a good chance you will need some financial aid to complete your goal. The community may donate postage, paper, telephone costs and other materials. Some members of the team might contribute these essentials.

Small planning efforts will normally not require any salaries, but there may be services that will have a cost. Earlier we discussed secretarial support, which may not be free. There may be duplicating costs associated with gathering data from private and public agencies.

If the committee will rent a facility for meetings or for public participation, you need to determine the number of meetings and the cost per meeting.

Planners often use the term "in-kind" to describe those supplies and services that someone already has and is willing to donate to the project at no additional cost. Most small planning efforts will rely on this type of support.

Even when using "in-kind" contributions, it is useful to develop a budget. This way the sponsoring community has an idea of the resources needed to accomplish a quality job. A budget lets the sponsor know whether or not it can supply the resources. If you estimate secretarial support for one day a week, the sponsor will have to plan for this. The sponsor can determine whether the person can spend time on the project without jeopardizing other required work.

Preparing a list or budget and having it approved by those ultimately responsible before you begin will avoid embarrassment and frustrations later in the process. It will allow you to develop alternative approaches if the sponsoring community feels it cannot contribute the resources to complete the planning effort. Nothing causes people to become discouraged more, than after investing their time and energy in a project, finding out that it cannot be completed.

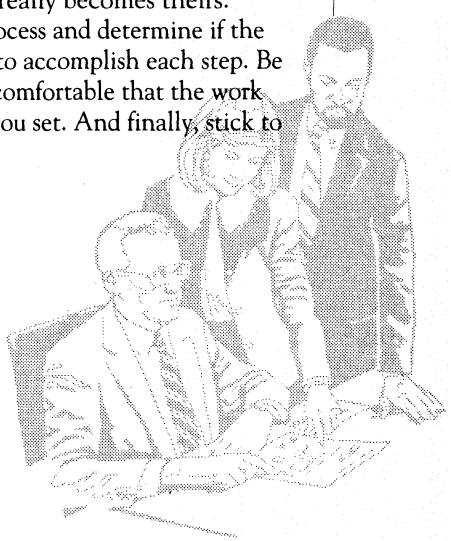
Critical Points

Earlier I discussed developing a tentative time frame for the planning process. This allows you to tell potential team members what their commitment will be.

When you develop this time line, consider the major steps in the planning process and how long it will take to accomplish each. How easy will it be to find the data and how long do you estimate it will take? Will you have public participation and at what point? If you invite participation by mail, how long will you give people to respond?

When your planning team meets for the first time, it will be useful to share the major steps in the proposed process. Be flexible, though, and allow the team members to suggest other steps or changes to those proposed so the plan really becomes theirs.

Review the critical points in the process and determine if the suggested time you assigned is adequate to accomplish each step. Be sure that all members of your group are comfortable that the work can be done within the tentative dates you set. And finally, stick to deadlines as much as possible.



Reaching Conclusions

After your team has gathered the data it needs and analyzed the information, it will be time to develop the actual plan.

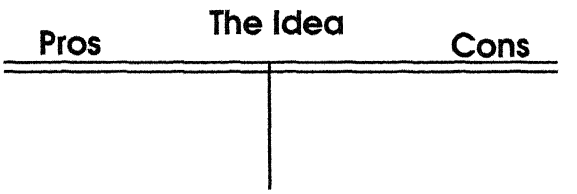
Frequently, planners use the term "scenarios." Simply put, scenarios are different ideas about what could occur if your plan was accepted. These are useful ways to think about your plan's first draft. Don't try to come up with the very best idea first. Rather, try to suggest several different strategies or approaches.

A good technique to develop these alternatives is called "brainstorming." On cards or a flip-chart each team member lists as many approaches as he or she can to address the planning goal. Some ideas may be a little wild and crazy. Great! Some will be right on and generate immediate enthusiasm. The goal at this stage is to get all possible ideas, strategies, alternatives or approaches before the group for consideration. At this point, no one should be critical of the idea. Let the creative juices flow.

Most problems or opportunities have a number of successful solutions or possibilities. Now that you have all these alternatives available, how does your group choose the one(s) that it will recommend for action. This would be an ideal time to open the accordion.

Take these possibilities back to the community for their thoughts. By taking several possibilities to the wider group, you show that you really care about their input into the committee's planning process.

A simple method for analyzing the alternatives is to list each and then draw two columns. One column will list the advantages and the other column will list disadvantages. For example:



An alternative may have many advantages but one disadvantage may be so great that it rules out the idea. In some cases, the disadvantages can be overcome with a slight modification of the original idea.

When you are finally ready to offer your best approach, do some "what if" thinking. Try to picture what happens if your idea is implemented. A few questions to consider might include:

1. Who will be happy; who will not?
2. What are the benefits?
3. What are the costs?
4. What changes will be necessary for this plan to occur?
5. Will the decision-makers accept the plan?
6. What will be the objections to the plan?
7. Does the community have adequate resources to make the plan happen?
8. Will there be winners? Will there be losers?
9. Does this approach really address all the problems/ opportunities that were part of the original goal for your team?
10. Will this plan be accepted readily or will it require some selling?

Only after you have explored all the options and asked some difficult questions as a committee, should you present your final plan to the community.

The Final Product

The great day has arrived and your group has completed its plan. The recommendations or decisions are set. You have included the action steps to carry out the ideas. Now what?

The community that started the project should have been involved throughout the process so the results are not going to be a surprise. Now it is time to complete the planning phase and to share the plan.

Who should receive the plan and in what form? Do you schedule a public meeting and invite all interested community members? Should you request time on the agenda of a scheduled meeting to present the ideas or do you simply mail out the results? Do you need to combine a variety of methods?

For example, if you call a meeting, some of the individuals who need the plan may not attend. Yet, you must get the results to them also.

Are there individuals who should receive the plan before others? Was the planning goal of such importance that the public may need to know about your conclusions? If so, prepare a press release or contact the media and invite them to come to learn

about the results. Will you send a final report to others who may have an interest in the topic but who are not a part of your community?

Your committee should answer these questions well in advance of completing the work. This will allow time to complete any special arrangements such as printing, scheduling a press conference or other finishing touches.

Be Prepared

In an earlier section, I suggested one question to consider is "will the plan be readily accepted or will you need to sell the idea?"

Prepare to present your plan in as much detail as necessary so those who receive it understand why you have made this proposal. Briefly, remind the group of your goals. Share the data your committee reviewed, discuss the options you considered and explain why you selected the strategies you did.

If you were hearing this plan for the first time, what objections might you have? Try to address these concerns in your presentation.

Ideally, you can share the results in person in order to make a thorough presentation. If this is not possible, be sure to write a letter that goes with the plan. In this letter, try to cover the points discussed above.

If your plan will affect a large number of people, see if the media will provide an opportunity for you to share the plan. A press conference would be an ideal way for this to occur. Again, prepare for difficult questions if your plan addresses a controversial issue.

The difference between the possible and impossible lies in a person's determination.
—Tommy Lasorda

Evaluate

Now that all the activity is done, was your planning effort a success? If your recommendations were well received and the actions suggested were accomplished, the answer is yes.

As leader of the effort, you will want some feedback on how well you did. Consider asking a few questions of your committee about the process used. Typical questions include:

- What were the strengths of the process?
- What were the weaknesses?
- How can the process be improved?

Also, ask some questions about your role as team leader. Again, try to ask questions that allow committee members to share their thoughts. Avoid questions that can be answered with a simple yes or no. Put these questions to your committee in a written format. Ask them to complete the questions before they leave the meeting. If they do not have to sign the questionnaire, you probably will receive better information. This feedback will help you be more effective the next time you lead a group.

Usually by observation, the committee can determine if their recommendations were on target. In some cases, it will be useful to send a questionnaire or to interview those who were affected by your ideas. This will allow the committee to know if any further planning should be done to assure success. You may find also that some recommendations had an unintended outcome. These results might be positive or negative. If negative, the committee may suggest additional changes to improve the results.

Evaluating the process, your role and the outcome(s) is the final step in the planning process.

Celebrate

Your committee has worked hard and the task is done. Be sure that each member of the team is given credit for his or her participation. This may mean a simple thank you letter or a public acknowledgment in the newspaper or at a meeting of the club or community group. At the very least, give some time for reflections and farewells at the final meeting.

Small cheer and great welcome makes a merry feast.
—Shakespeare

If the planning budget allows for a token gift, consider a final dinner together or a certificate or other memento. This would be an ideal way to recognize each member's contribution. This will bring an official conclusion to the project.

Frequently, after a group has worked together on a difficult project for a long time, it is hard to come to the end. It might be

wise to schedule an additional session for the group in the future. This meeting could occur to see what actually happened to the community because of your efforts. Also, this lets a group that has worked together intensively have some time to unwind from the process without an abrupt halt.

All of us find it difficult to let go of projects we enjoy. If your planning team has worked well together, some members will find it hard to bring the project to an end. There may be opportunities to become involved in the action steps and this will allow those members to stay involved but on a different level.

And Finally

Practice is the best of all instructors.
—Syrus

The purpose of this bulletin has been to highlight some of the major issues a first-time planner will encounter and to suggest ideas and cautions to help avoid common mistakes many of us make.

For a more detailed explanation of the planning process, you may want to consult the resources listed in the appendix.

Appendix

Bradford, Leland P. *Making Meetings Work: A Guide for Leaders and Group Members*. San Diego: University Associates, 1984.

Dimock, Headley G. *Groups: Leadership and Group Development*. San Diego: University Associates, 1987.

Fisher, Roger, and William Ury. *Getting to Yes: Negotiating Agreement Without Giving In*. New York: Penguin Books, 1981.

Johnson, David W., and Frank P. Johnson. *Joining Together: Group Theory and Group Skills*. Englewood Cliffs, NJ: Prentice-Hall, 1975.

Schindler-Rainman, Eva, and Ronald Lippitt. *Taking Your Meetings Out of the Doldrums*. Revised edition. San Diego: University Associates, 1985.

Notes